

2ND QUARTER 2017 MARKETING REPORT

Branson Convention & Visitors Bureau
September, 2017

- U.S. Travel Performance
- Travel Industry Update
- Branson 2Q 2017 Performance
- Branson Visitor Update
- Department Updates

PRESENTATION OVERVIEW

TRAVEL PERFORMANCE

ALL INFORMATION *REPORTED* IS THE MOST RECENT AVAILABLE AS OF AUGUST 15, 2017



U.S. LEISURE & BUSINESS TRAVEL

The U.S. Travel Association forecasts that domestic leisure trips are expected to grow by 1.8% in 2017 with person-trips increasing to 1.75 billion. This would represent an increase of nearly 286 million person-trips. But, the rate of growth has been slowing in recent years. While this year's growth at 1.8% would be slightly better than last year's 1.7%, it remains short of the 2.7% average recorded between 2010-2015.

U.S. ROOM DEMAND +2.5%

According to STR, U.S. room demand increased 2.6% in June 2016 and is up 2.2% over the last 12 months. Additionally, ADR has climbed another 2.7% over the past 12 months.

- Jun 2017 YTD Occupancy: +0.7%
- Jun 2017 YTD Room Demand: +2.5%
- Jun 2017 YTD Revenue: +4.9%

SOURCE: STR, JUNE 2017 REPORT

INDUSTRY UPDATE

ALL INFORMATION *REPORTED* IS THE MOST RECENT AVAILABLE AS OF AUGUST 15, 2017

AIRBNB HAS REACHED A GLOBAL TOTAL OF 4 MILLION LISTINGS

This gives it more available rooms than the top five hotel brands combined, though it remains behind several hotel chains in terms of U.S. inventory. The 4 million overall listings are spread across 191 countries, and the U.S. remains the company's biggest market with 660,000 of those, followed by four European countries. Nearly half of the company's listings can now be booked instantly without having to get the owner's individualized approval. Source: Business Insider

CONSUMER SPENDING NUDGED UPWARD TO A NINE-YEAR HIGH IN JULY

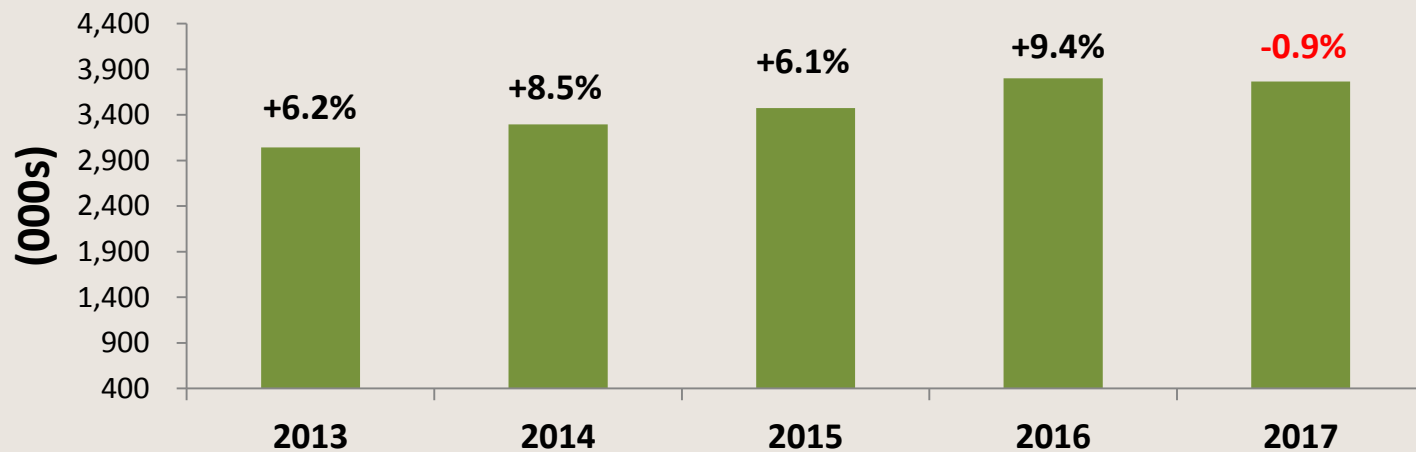
Americans reported spending a daily average of \$109 last month, making it the highest average since May 2008 and the sixth consecutive month of the average being above \$100. Spending increased slightly among both higher- and lower-earning Americans, categories separated by an income level of \$90,000. Source: Gallup

BRANSON 2Q PERFORMANCE

ALL INFORMATION *REPORTED* IS THE MOST RECENT AVAILABLE AS OF AUGUST 15, 2017

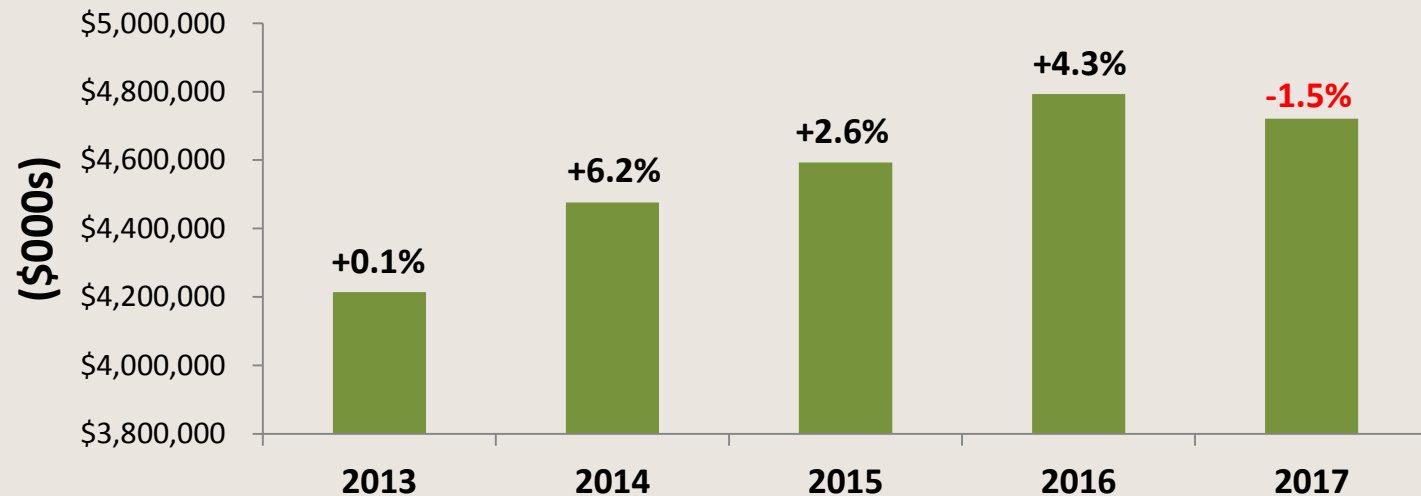
BRANSON ESTIMATED VISITATION

2nd Quarter YTD 2017



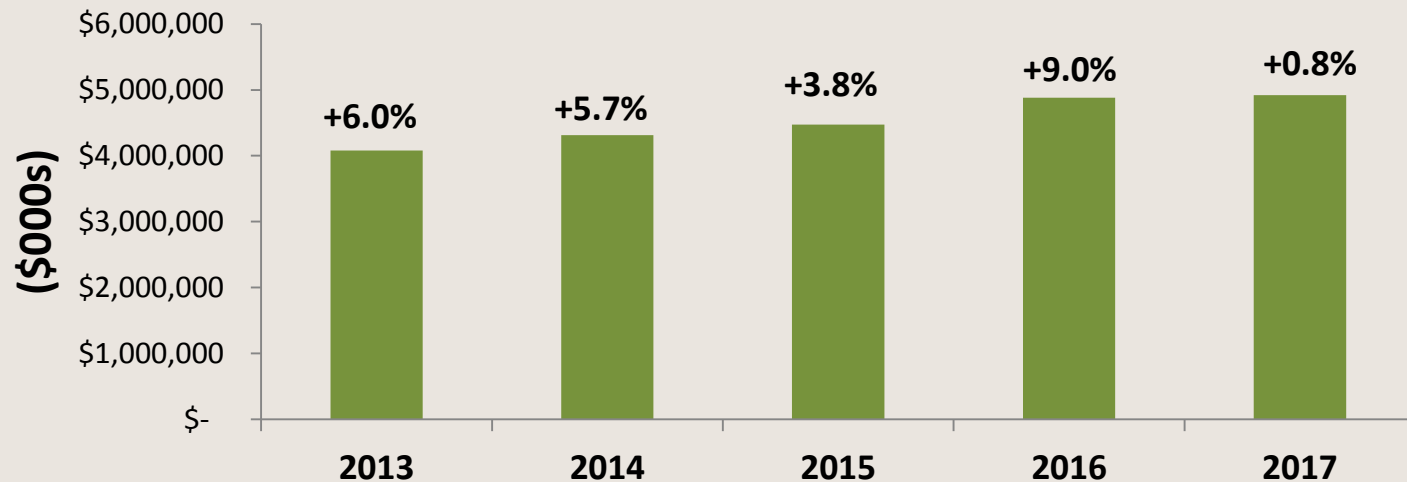
CITY OF BRANSON SALES TAX

2nd Quarter YTD 2017



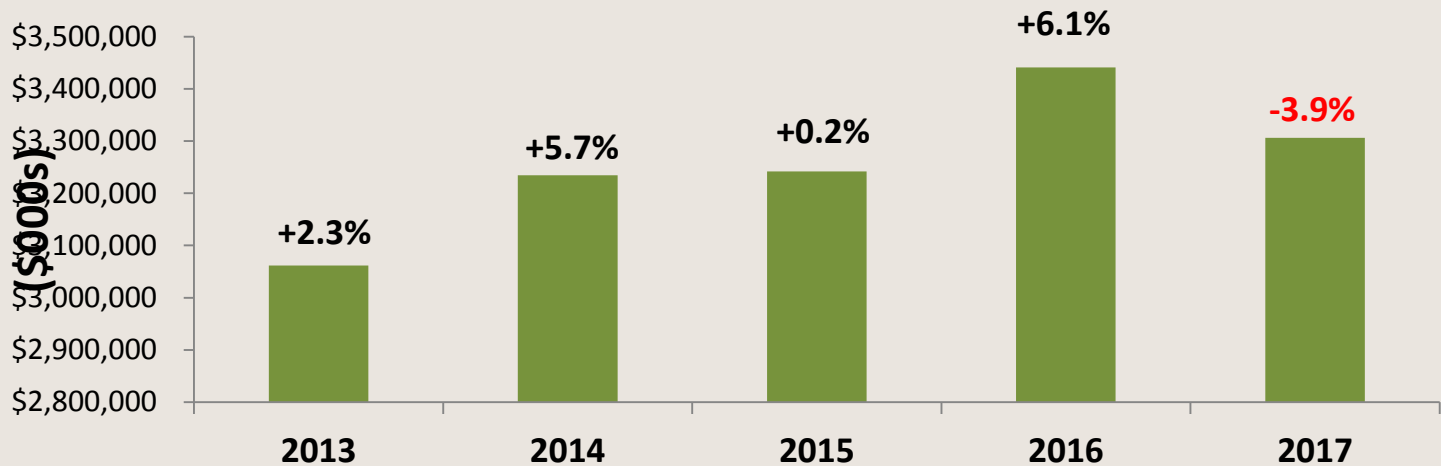
CITY OF BRANSON TOURISM TAX

2nd Quarter YTD 2017



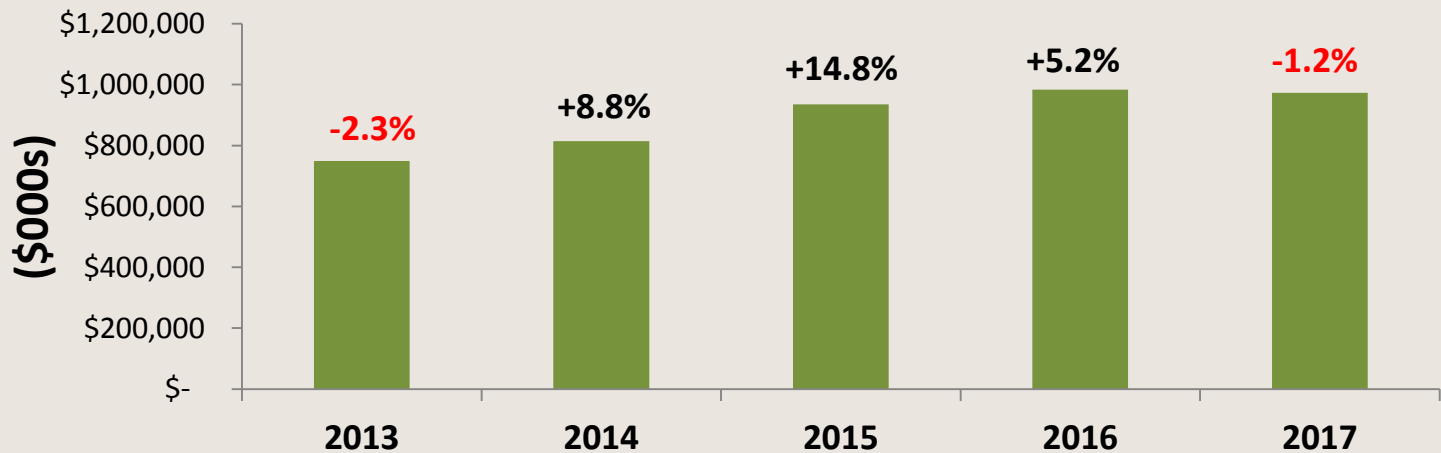
TCED TOURISM TAX

2nd Quarter YTD 2017



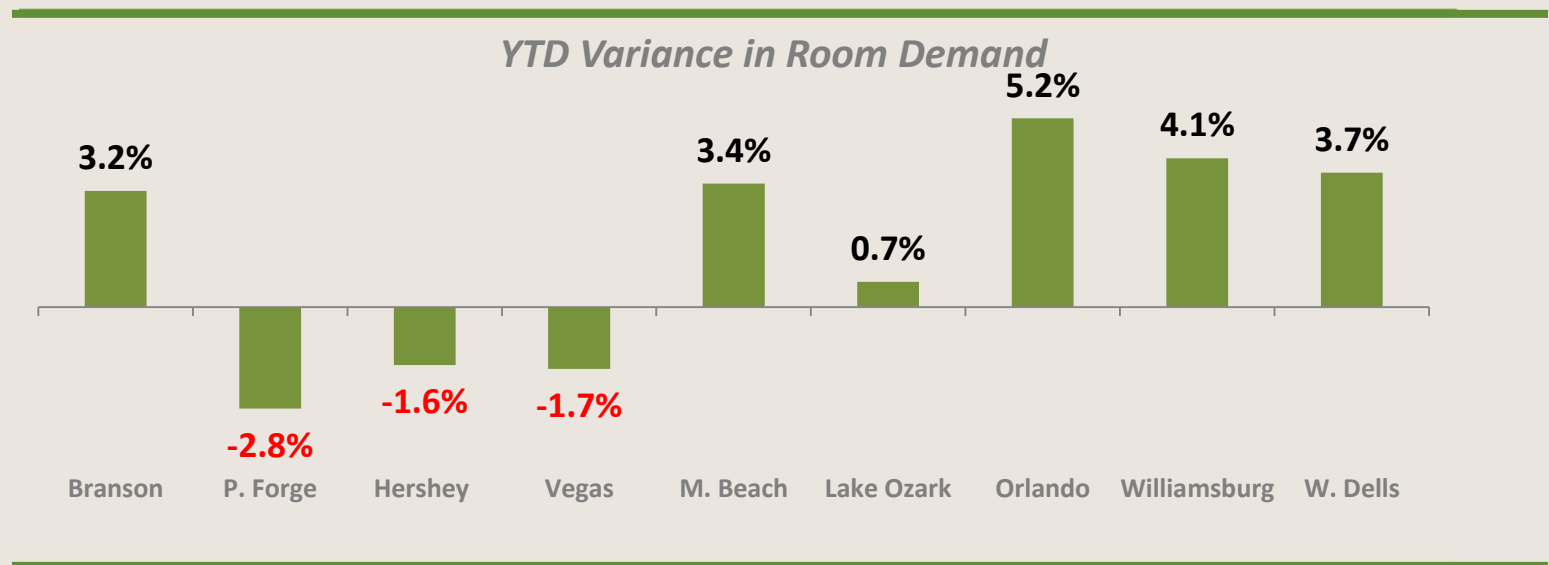
STONE COUNTY TAX

2nd Quarter YTD 2017



ROOM DEMAND COMPARISON

2nd Quarter YTD 2017



BRANSON VISITOR UPDATE

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YTD VISITOR TRENDS

METRIC	2017	2016	VAR
SPENDING/PARTY	\$917	\$779	+\$138
FIRST-TIMERS	27%	19%	+8%
% FAMILIES	39%	40%	-1%
AVG ADULT AGE	56.9 yrs	55.2 yrs	+1.7 yrs
LOS	4.2 nts	3.9 nts	+0.3 nts
% SEEING SHOWS	71%	65%	+6%
AVG # SHOWS SEEN	3.3	3.0	+0.3

n = 477; MOE = +/- 4.5% at a 95% Confidence Interval.

VISITATION BY MARKET

<u>METRIC</u>	<u>% VISITORS</u>	<u>VAR TO 2016</u>
CORE MARKETS	13%	+ 1%
PRIMARY MARKETS	35%	- 1%
OUTER MARKETS	25%	- 2%
<u>NATIONAL MARKETS</u>	<u>27%</u>	<u>+ 2%</u>
TOTAL	100%	+0.0%

SOURCE: H2R MARKET RESEARCH, MAY 2017 YTD

MOST INFLUENTIAL SOURCES

22%

Searched online
for a specific
Branson
business

20%

Discussed
Branson with a
friend

20%

Looked up Branson
on my computer at
home

DEPARTMENT UPDATES

LEISURE GROUPS

- **April 2017 hosted 9th Annual Professional Travel Planner FAM.**
 - 39 tour operators, travel agents and guests attended.
 - 25 Branson businesses participated
 - Post survey results noted 100% of buyers will plan a group trip to Branson due to FAM
- **April 2017 -Attended Bank Travel Exchange in St. Charles, MO.**
Promoted Branson as host city in 2018.
- **April 2017 - The Military Reunion Network Association selected Branson to host annual Central Regional Round Table Conference in 2018.**
- **May 2017 - Branson hosted Heritage Club International Board Meeting.**
Presented plans for Branson to host HCI conference in 2018.
- **June 2017 hosted 11th Annual Music Director FAM Tour.**
 - 21 music teachers and guests attended.
 - 25 Branson businesses participated
 - Post survey results noted 100% of the teachers will plan a group trip to Branson due to FAM.

MEETINGS & CONVENTIONS



- Distributed 69 Meeting RFPs into the Branson Community (20% increase from 2016).
- Presented video to 2,300 attendees at MPI World Education Congress.
- ExploreBranson.com/Meetings Metrics:
 - Meeting Convention Facilities pageviews up 59.09% YOY
 - Time on meetings pages up 16.36% YOY
 - Meeting Guide pageviews up 6.94% YOY
 - Contact Us pageviews up 5.26% YOY

SPORTS MARKETING AND DEVELOPMENT

- Benefit the Badge March 31 – April 2:
 - Fogle Foundation raised over \$110K during this first year, donating \$40K to support Law Enforcement Week with add'l funds donated to area police departments.
- Big Bass Tour April 1-2:
 - 863 anglers competed from 21 states.
 - Facebook Reach: 756,494 impressions for the week, 4,617 engagements
- Bass Pro Shops Legends of Golf returned April 19-23:
 - PGA and Bass Pro Shops announced a four (4) Title Sponsorship extension of the BPS Legends of Golf at Big Cedar Lodge (through 2021).
- Taneycomo Throwdown April 21-23:
 - PDGA Sanctioned A-Tier Disc Golf tournament hosted at Branson Cedars, Branson Trails, Don Gardner and Sunset Park.
 - Branson Area Golf Council (BGC):
 - Working with Golf Package Pros on new golf travel packaging website (BransonGolfTravel.com) which will launch in the fall. The BGC members are currently updating photography.
- Branson Firefighter Combat Challenge June 9-10:
 - Postponed from May 5-6 due to heavy rains and flooding at Branson Landing.
 - 13 states represented – AR, CA, CO, IA, KY, MI, MN, MO, NE, NM, OK, SD, and TX.

PUBLIC RELATIONS

- First time in Travel South showcase history, journalist delegates gave the experience in Branson a perfect 5.0 overall ranking.
- Recent accolades: OnlyinYourState.com – Best Summer Vacation Spot in Every State; *Country Living* magazine – “25 Best Small Lake Towns in America”; “Biggest Small Towns” on TravelChannel.com; First time ever in *Vogue* magazine – “Why You Should Plan a Road Trip Through the Ozark Mountains”; *Readers Digest* – “15 Best Summer Weekend Getaways You’ll Want to Book This Second.”

DIGITAL MARKETING

ExploreBranson.com

- 614,052 site visits
- 1,736,264 pageviews
- Top locations:
 - Chicago
 - St. Louis
 - Dallas

Social & Content

- Completed 14 video shoots
- Installed revised Selfie Stars
- Launched Selfie Star social campaign



THANK
YOU

Questions?

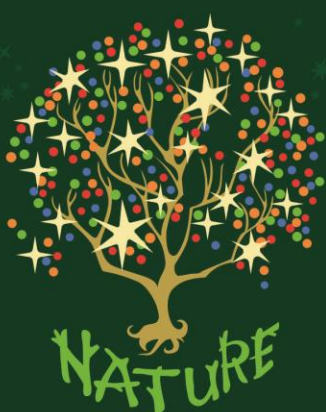
2017 CHRISTMAS MARKETING

Branson Convention & Visitors Bureau

PLANNED CHRISTMAS DIGITAL

- Revised creative for brochure and ground graphics
- Media Investment
 - \$20,000 – Social Media
 - \$25,000 – Content Distribution
 - \$67,470 – Display
 - \$10,000 – SEM





**A DAZZLING CELEBRATION OF
NATURE, TRADITION & CREATIVITY!**

Experience the wonder and tradition of an
Ozark Mountain Christmas in Branson from
November through New Year's Day.

Use this map and the corresponding Christmas
ornament ground graphics to discover Branson's
most brilliantly decorated and festive Christmas
trees. From beautiful Nature trees to dazzling
Dancing Lights; Traditional to uniquely
Creative-themed trees, it's a map of treasures.

Share your holiday memories at
#ExploreBranson



#ExploreBranson

**BRANSON
CHRISTMAS
TREE TOUR**



- 1 BRANSON CENTENNIAL MUSEUM**
120 S. Commercial St.
- 2 BRANSON CHAMBER OF COMMERCE**
Branson Meadows
- 3 BRANSON PETAL PUSHERS**
209 W. Pacific
- 4 CENTRAL BANK OF BRANSON**
400 US 65 Business
- 5 CICI'S PIZZA**
3460 W. Hwy 76
- 6 CITY OF BRANSON (A)**
Cox Medical Center Roundabout
- 7 CITY OF BRANSON (B)**
City Hall Front Fountain
- 8 CITY OF BRANSON (C)**
Firehouse #1
- 9 COMFORT INN - THOUSAND HILLS**
203 Wildwood Dr.
- 10 DOWNTOWN BRANSON ALLIANCE**
123 W. Main St.
- 11 EMPIRE ELECTRIC**
215 W. Main St.
- 12 GRAND COUNTRY**
W. Hwy 76
- 13 GRAND VILLAGE**
W. Hwy 76
- 14 GREAT AMERICAN STEAK & CHICKEN**
2421 W. Hwy 76
- 15 HOLIDAY INN EXPRESS**
2801 Green Mountain Dr.
- 16 O'REILLY AUTOMOTIVE**
1650 Hwy 248
- 17 PASGHETTI'S**
3129 W. Hwy 76
- 18 PRESLEYS' THEATRE**
2920 W. Hwy 76
- 19 QUALITY INN WEST**
3601 Shepherd of the Hills Expwy.
- 20 RIPLEY'S ODDITORIUM**
3326 W. Hwy 76
- 21 SHOWBOAT BRANSON BELLE**
4800 Missouri 165
- 22 TITANIC MUSEUM ATTRACTION**
3235 W. Hwy 76
- 23 TRACK IV**
3345 W. Hwy 76



- 24 THE BRANSON FERRIS WHEEL**
3345 W. Hwy 76
- 25 WHITE RIVER VALLEY ELECTRIC**
Junction of Hwy 65 & Hwy 76
- 26 WHITE RIVER VALLEY ELECTRIC**
2449 E. Hwy 76
- 27 WORLD'S LARGEST TOY MUSEUM**
3609 W. Hwy 76
- 28 CHATEAU ON THE LAKE**
415 N. State Hwy 265
- 29 DIXIE STAMPEDE**
1525 W. Hwy 76

- 30 SILVER DOLLAR CITY**
399 Silver Dollar City Pkwy.
- 31 BRANSON CONVENTION CENTER**
200 S. Sycamore
- 32 IMAX**
3562 Shepherd of the Hills Expwy.
- 33 BRANSON LANDING**
100 Branson Landing Blvd.
- 34 SIGHT & SOUND THEATERS**
1001 Shepherd of the Hills Expwy.
- 35 RIDE THE DUCKS**
2320 W. Hwy 76

SOME CHRISTMAS TRADITIONS

GROW BRIGHTER EVERY YEAR



SILVER DOLLAR CITY OLD TYME CHRISTMAS



There's no tradition brighter than spending time together in Branson. Where twinkling lights astound, Christmas spirit abounds and joy to the world can be found on every street corner.

Take in a festive show, do some holiday shopping or behold the magical glow of 5 million lights.

This holiday make an Ozark Mountain Christmas part of your family tradition.



Branson
MISSOURI
★

ExploreBranson.com

877-BRANSON

PLANNED CHRISTMAS TV

		NOV				DEC				
		30	6	13	20	27	4	11	18	25
HOLIDAYS			VD		TD					CD
		CHRISTMAS								
• CORE MARKET (O-100)										
• Springfield	• TV		450							
• Joplin/Pittsburg	• TV		450							
• PRIMARY "A" 101-300 MI.										
• Ft Smith/Fayetteville (159 Mi)	• TV		450							
• Little Rock (171 Mi)	• TV		450							
• Tulsa (221 Mi)	• TV		450							
• Kansas City (232 Mi)	• TV		450							
• St Louis (252 Mi)	• TV		450							

